

All Funds**Senior Services****Mission/
Summary****Mission**

The mission of the Waukesha County Department of Senior Services is to affirm the dignity and value of older people through services, support and opportunities which promote choice, independence and community involvement.

Financial Summary	2004	2005	2005	2006	Change From 2005	
	Actual	Adopted Budget	Estimate	Budget	Adopted Budget \$	%
General Fund						
Expenditures	\$1,991,673	\$2,267,948	\$2,103,418	\$2,376,972	\$109,024	4.8%
Revenues	\$943,230	\$1,002,177	\$1,006,089	\$1,098,701	\$96,524	9.6%
Tax Levy	\$1,218,352	\$1,265,771	\$1,265,771	\$1,278,271	\$12,500	1.0%
Nutrition Fund						
Expenditures	\$1,141,392	\$1,144,816	\$1,103,693	\$1,144,924	\$108	0.0%
Revenues (a)	\$948,453	\$969,229	\$965,427	\$960,737	(\$8,492)	-0.9%
Tax Levy	\$188,006	\$175,587	\$175,587	\$184,187	\$8,600	4.9%
Total All Funds						
Expenditures	\$3,133,065	\$3,412,764	\$3,207,111	\$3,521,896	\$109,132	3.2%
Revenues	\$1,891,683	\$1,971,406	\$1,971,516	\$2,059,438	\$88,032	4.5%
Tax Levy	\$1,406,358	\$1,441,358	\$1,441,358	\$1,462,458	\$21,100	1.5%
Position Summary (FTE)						
Regular Positions	21.05	19.91	19.97	19.91	0.00	
Extra Help	2.38	3.73	3.72	3.64	(0.09)	
Overtime	0.22	0.15	0.23	0.19	0.04	
Total	23.65	23.79	23.92	23.74	(0.05)	

(a) Includes Nutrition fund balance appropriations of \$6,475 in the 2005 adopted budget and \$2,375 in the 2006 budget for one-time items.

General Fund

Senior Services

Fund Purpose/
Summary**Fund Purpose**

The Department of Senior Services General Fund operations are responsible for planning, providing, and coordinating programs that address the needs of Waukesha County older adults and their caregivers. These programs provide supportive services and opportunities including adult day centers, case management, chore services, community services, emergency intervention, health cost sharing, homemaker services, information and assistance, legal/benefit assistance, outreach, personal care, respite, specialized transportation, and volunteer services. The General Fund also includes Department activities as the lead-reporting agency for instances of Elder Abuse and Neglect in Waukesha County.

The Department of Senior Services is an entry point for accessing services in the aging network. As a resource center for departments, community agencies, organizations and individuals, the Department encourages collaboration and coordination of resources, activities, and programs serving older people. The General Fund is comprised of three organizational areas: Administration, Information and Assistance, and Program Monitoring and Evaluation.

Financial Summary	2004	2005	2005	2006	Change From 2005	
	Actual	Adopted Budget	Estimate	Budget	Adopted Budget	
					\$	%
Personnel Costs	\$734,658	\$833,101	\$802,366	\$859,288	\$26,187	3.1%
Operating Expenses	\$1,181,132	\$1,368,120	\$1,234,775	\$1,444,724	\$76,604	5.6%
Interdept. Charges	\$75,883	\$66,727	\$66,277	\$72,960	\$6,233	9.3%
Fixed Assets	\$0	\$0	\$0	\$0	\$0	N/A
Total Expenditures	\$1,991,673	\$2,267,948	\$2,103,418	\$2,376,972	\$109,024	4.8%
General Government	\$917,545	\$978,695	\$966,981	\$1,075,754	\$97,059	9.9%
Fine/Licenses	\$0	\$0	\$0	\$0	\$0	N/A
Charges for Services	\$11,753	\$10,863	\$11,467	\$10,952	\$89	0.8%
Interdepartmental	\$73	\$0	\$0	\$0	\$0	N/A
Other Revenue	\$13,859	\$12,619	\$12,521	\$11,995	(\$624)	-4.9%
Appr. Fund Balance (a)	\$0	\$0	\$15,120	\$0	\$0	N/A
Total Revenues	\$943,230	\$1,002,177	\$1,006,089	\$1,098,701	\$96,524	9.6%
Tax Levy	\$1,218,352	\$1,265,771	\$1,265,771	\$1,278,271	\$12,500	1.0%
Exp. (Over) Under Rev. & Levy	\$169,909	-	\$168,442	-	-	-
Position Summary (FTE)						
Regular Positions	12.45	12.30	12.30	12.30	0.00	
Extra Help	0.00	1.03	0.86	0.92	(0.11)	
Overtime	0.21	0.14	0.22	0.18	0.04	
Total	12.66	13.47	13.38	13.40	(0.07)	

(a) Fund balance represents a carryover of funding from 2004 to 2005 to assist with the purchase of Case Management Software.

Departmental Strategic Objectives**Provide Comprehensive Customer Service**

1. Provide access to programs and services that meet the assessed needs of older adults and help them remain living safely in their home of choice. (Strategic Plan Goals 1.1 and 3.1) (4th Qtr)
2. Enhance the organizational efficiency of the Caregiver Resource Library to make library resources more available and meet the information needs of caregivers and grandparent caregivers. (Strategic Plan Goal 1.1) (4th Qtr)
3. In collaboration with the County Executive's office, enhance access to Waukesha County programs and offices through the availability of volunteer greeters equipped to provide information and directions to English-speaking and Spanish-speaking visitors. (Strategic Plan Goals 1.1 and 4.1) (4th Qtr)

Innovate and Seek Continuous Quality Improvement

1. Following complete conversion to the Synergy case management and tracking system, review program workflow to enhance efficient and effective use of resources. (Strategic Plan Goal 2.2) (4th Qtr)

Manage Resources With Fiscal Prudence

1. Continue to collaborate with the Specialized Transportation Network (STPN) to provide cost effective transportation alternatives for customers that are appropriate for their individual needs. (Strategic Plan Goal 1.3) (4th Qtr)

Retain and Develop a High Quality Workforce

1. Maintain a quality workforce through internal communication and opportunities for programmatic and motivational education and training. (Strategic Plan Goal 2.1) (4th Qtr)

Major Departmental Strategic Achievements from 7/01/04 to 6/30/05

1. In July of 2004, staff participated in customer service oriented training that emphasized job enjoyment, choosing an attitude, being there for customers and making their day. An all-staff programmatic in-service in September of 2004 focused on understanding generational differences. Monthly staff meetings which foster communication and an opportunity for general staff input began in May of 2005. (Strategic Plan Goal 2.1)
2. In December of 2004, completed the GRAND (Grandparents/Relatives Raising and Nurturing Dependent Children) Resource Guide to help grandparents and relatives as they assume parenting responsibilities. Published GRAND on department website and coordinated with Waukesha County Self Help Court for online availability of guide to customers. (Strategic Plan Goals 1.1 and 3.1)
3. By December of 2004, volunteers had served 39,730 hours, a 2.0% increase from 2003. Based on Waukesha County pay ranges for unclassified and semi-skilled employees, volunteer service equated to \$278,561. (Strategic Plan Goals 4.1 and 4.2)
4. By December of 2004, completed presentations on resources, options, early intervention, and crisis prevention to 36 community groups. (Strategic Plan Goal 3.1)
5. By December of 2004, provided information to 2,012 caregivers through the combination of Caregiver Resource Library loans, newsletters, and group presentations. (Strategic Plan Goals 1.1 and 3.1)
6. In 2005, 97.9% of customers responding to the annual survey said that program services were useful and/or met their needs. 94.7% stated program services helped them to remain living safely in their home or apartment. (Strategic Plan Goals 1.1 and 3.1)
7. In April of 2005, conducted volunteer in-service to re-register all volunteers in compliance with Waukesha County revised volunteer policy.
8. Working with the Department of Administration Information Systems Division, Synergy SAMS software suite was installed in May of 2005. Conversion is on target and will be completed by 4th quarter of 2005. (Strategic Plan Goal 5.1)

Information and Assistance

Program Description

Entry point for accessing services for older people, providing: relevant resources and information to older adults, caregivers and the community; assistance and referral; and filing elder abuse/neglect reports.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	3.15	3.82	3.68	3.84	0.02
Personnel Costs	\$191,262	\$226,101	\$205,848	\$234,015	\$7,914
Operating Expenses	\$38,468	\$43,202	\$42,966	\$52,313	\$9,111
Interdept. Charges	\$22,382	\$21,607	\$21,913	\$25,278	\$3,671
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$252,112	\$290,910	\$270,727	\$311,606	\$20,696
General Government	\$81,810	\$109,176	\$97,853	\$119,908	\$10,732
Other Revenue	\$0	\$0	\$0	\$0	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$81,810	\$109,176	\$97,853	\$119,908	\$10,732
Tax Levy	\$170,019	\$181,734	\$181,734	\$191,698	\$9,964
Exp. (Over) Under Rev. & Levy	(\$283)	-	\$8,860	-	-

Program Highlights

Personnel costs increase primarily due to normal step and merit increases. Operating expenses include \$2,000 for office equipment, and increases of \$1,600 from \$1,600 to \$3,200 in 2006 for programmatic promotional supplies, and \$3,850 from \$25,600 to \$29,450 in 2006 for outside printing. Increased outside printing will provide additional Senior Sources booklets for the Family Caregiver program. Additional interdepartmental charges are due to increases of \$1,745 from \$12,233 to \$13,978 for postage and \$1,990 from \$4,561 to \$6,551 for computer support and total costs of ownership in 2006.

Increased General Government revenue available to partially offset program costs in 2006 results from additional Federal Older Americans Act Title IIIB Supportive Services funding of \$6,777 from \$51,742 to \$58,519, and Title IIIE Family Caregiver funding of \$3,955 from \$57,434 to \$61,389.

Performance Measure Description

Department standard: 93% positive responses to participant survey.

Performance Measures

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Increased knowledge of crisis prevention & service options.	100.0%	93.0%	95.0%	95.0%	2.0%

	2002 Act.	2003 Act.	2004 Act.	2005 Est.	2006 Proj.
I & A Incoming Calls	11,568	12,854	12,655	12,359	12,729
Caregiver Library Items Used	512	2,449	2,471	2,784	2,883
Newsletter Distribution	1,700	3,561	1,806	2,830	4,080
Senior Sources Distribution	7,400	7,500	7,500	8,200	10,000
Presentation Attendees	1,870	1,292	1,398	1,396	1,396

Activity

The Department of Senior Services conducts a variety of activities to provide information and assistance responsive to customer needs.



Case Management

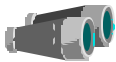
Program Description

Case managers provide needs assessment, service referral, and counseling to older adults and caregivers through a combination of telephone assistance, group/family conferences, and home visits.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	1.73	1.60	1.57	1.55	(0.05)
Personnel Costs	\$93,987	\$112,609	\$105,606	\$113,252	\$643
Operating Expenses	\$873	\$19,470	\$29,399	\$10,570	(\$8,900)
Interdept. Charges	\$9,665	\$10,346	\$9,701	\$10,094	(\$252)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$104,525	\$142,425	\$144,706	\$133,916	(\$8,509)
General Government	\$31,813	\$26,155	\$25,061	\$28,307	\$2,152
Other Revenue	\$0	\$0	\$0	\$0	\$0
Appr. Fund Balance (a)	\$0	\$0	\$15,120	\$0	\$0
Total Revenues	\$31,813	\$26,155	\$40,181	\$28,307	\$2,152
Tax Levy	\$118,643	\$116,270	\$116,270	\$105,609	(\$10,661)

Exp. (Over) Under Rev. & Levy	\$45,931	-	\$11,745	-	-
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(a) Fund balance represents a carryover of funding from 2004 to 2005 to assist with the purchase of Case Management Software.



Program Highlights

Personnel costs include increases for normal step and merit increases offset by a reduction in overtime of \$3,636 or 51.6% from \$7,051 to \$3,415.

In 2005, the Synergy software suite was acquired for case management, resulting in a decrease of \$15,120 in 2006 operating costs. This decrease is partially offset by an increase of \$6,220 for software maintenance in 2006.

General Government revenue increase in 2006 is due to additional Federal Older Americans Act Title IIIB Supportive Services funding of \$1,624 from \$17,238 to \$18,862, and Title IIIE Family Caregiver funding of \$528 from \$8,917 to \$9,445.

Performance Measure Description

Positive responses to customer surveys regarding remaining in home – The department's acceptable goal is 95%.

Performance Measures	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Enhance independence and ability to remain living in home of choice through responsive care plans.	98.5%	98.0%	92.4%	95.0%	(3.0%)



Activity

Case management visits may include discussion of multiple issues, be for assessment only, or may be for counseling of an older adult and/or caregivers. Clients may receive more than one type of case management visit. Visits may be in person or conducted by telephone.



Number of People Receiving Case Management Visits	2002 Act.	2003 Act.	2004 Act.	2005 Est.	2006 Proj.
Multiple issues visit	1,196	961	709	750	788
Single Program Assessment visit only	361	356	380	376	370
Counseling session only	113	144	115	120	120
Total	1,670	1,461	1,204	1,246	1,278

Benefit Specialist

Program Description

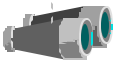
Provides assistance to older adults in areas related to income maintenance, housing, surrogate decision making, consumer/finance issues, elder rights, legal and benefit problems, health care financing and reverse mortgage counseling.

	2004 Actual	2005 Budget	2005 Estimate (a)	2006 Budget	Budget Change
Staffing (FTE)	1.28	1.27	1.38	1.31	0.04
Personnel Costs	\$83,792	\$85,455	\$98,954	\$94,965	\$9,510
Operating Expenses	\$1,380	\$3,205	\$26,804	\$17,681	\$14,476
Interdept. Charges	\$5,953	\$5,351	\$5,321	\$5,520	\$169
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$91,125	\$94,011	\$131,079	\$118,166	\$24,155
General Government	\$50,745	\$50,745	\$88,694	\$71,330	\$20,585
Other Revenue	\$220	\$250	\$195	\$250	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$50,965	\$50,995	\$88,889	\$71,580	\$20,585
Tax Levy	\$42,028	\$43,016	\$43,016	\$46,586	\$3,570

Exp. (Over) Under Rev. & Levy	\$1,868	-	\$826	-	-
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(a) 2005 Estimate includes approved enrolled ordinance #160-O-018 to accept Medicare Part D grant funding.

Program Highlights



Benefit specialist services and assistance for the County's older adult population are provided with one benefit specialist on staff. Except for emergency crisis situations, the wait time for services is normally 2 – 3 weeks. No additional Federal or State revenue is provided to fund the basic program, however Federal and State funds are allocated for special benefit related programs, such as implementation of Medicare Part D which accounts for the increase of \$37,068 in the 2005 estimate above the 2005 budget and the \$20,585 increase in the 2006 budget. Tax Levy increases in 2006 cover the higher costs to maintain basic services at 2005 budget levels.

Performance Measure Description

Dept. Std: 95% positive response to Customer Survey regarding needs met and usefulness.



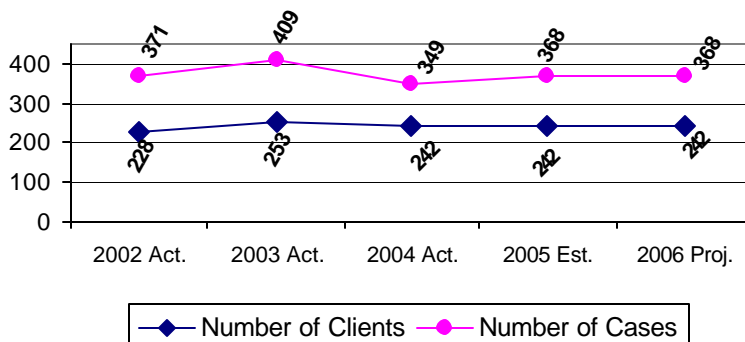
Performance Measures

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Overall incidence of needs met.	97.9%	95.0%	96.5%	95.0%	0.0%

Activity



Benefit Specialist Clients and Cases



Approximately 35% of clients using benefit specialist services have more than one open case during a year. The Benefit Specialist has an average of 100 – 120 open cases at any one time. Each case varies in complexity and time. With no change in staffing levels, the number of clients served is expected to remain unchanged.

Community Services

Program Description

Services include a wide range of short-term and long-term community and intervention programs for older people and their families. Coordinates volunteer programs that provide opportunities for older adults to serve the community.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	2.25	2.72	2.73	2.69	(0.03)
Personnel Costs	\$111,659	\$148,905	\$147,173	\$158,664	\$9,759
Operating Expenses	\$260,030	\$317,219	\$279,343	\$328,791	\$11,572
Interdept. Charges	\$14,128	\$9,958	\$9,582	\$10,706	\$748
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$385,817	\$476,082	\$436,098	\$498,161	\$22,079
General Government	\$274,028	\$307,353	\$269,223	\$317,806	\$10,453
Interdepartmental	\$73	\$0	\$0	\$0	\$0
Charges for Services	\$11,753	\$10,863	\$11,467	\$10,952	\$89
Other Revenue	\$13,597	\$12,344	\$12,281	\$11,720	(\$624)
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$299,451	\$330,560	\$292,971	\$340,478	\$9,918
Tax Levy	\$123,227	\$145,522	\$145,522	\$157,683	\$12,161

Exp. (Over) Under Rev. & Levy	\$36,861	-	\$2,395	-	-
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Program Highlights

Personnel costs increase primarily due to normal step and merit increases. Also health insurance increases \$2,571 or 11.8% resulting from a change with an employee health insurance election.

Higher operating expenses are primarily due to increases in contracted program services including Personal Care/Bath increase \$1,460 to \$72,066, Chore services increase \$1,000 to \$14,300, Homemaker/Light Cleaning increase \$5,340 to \$40,486 and contracted Family Caregiver and Elder Abuse prevention services increase of \$15,102 to \$91,012. Promotional program supplies increase by \$2,872 in the 2006 budget. These increases are partially offset by a decrease in contracted Respite care of \$13,650 from \$51,400 to \$37,750 to reflect prior year spending levels.

General Government revenue increases available to partially offset program costs in 2006 result primarily from additional Federal Older Americans Act Title IIIB Supportive Services funding of \$6,373 from \$154,564 to \$160,937, and Title IIIE Family Caregiver funding of \$3,913 from \$61,073 to \$64,986. Charges for services include donations/fees for the Caregiver and Fall Conferences are expected to slightly increase.

Performance Measure Description

Dept. Std: 95% positive response to Customer Survey regarding needs met and usefulness.

Performance Measures	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Overall incidence of needs met	97.9%	95.0%	97.8%	95.0%	0.0%

Activity

Clients Served Through Purchased Community Services					
'02 Act	'03 Act	'04 Act	'05 Bud	'05 Est	'06 Proj
732	804	736	741	763	784

The number of people served is expected to increase by 43 or 5.8%, primarily in Elder Abuse preventive services and Homemaker services.

Opportunities to Serve the Community Through Volunteering						
	2002 Act	2003 Act	2004 Act	2005 Bud	2005 Est	2006 Proj
# Volunteers	1,310	1,370	1,168	1,310	1,036	1,050
Volunteer Hours	39,438	38,935	39,730	39,438	31,959	31,959
Value of Hours	\$261,611	\$266,230	\$278,561	\$343,587	\$278,755	\$286,722

Volunteer value is based on Waukesha County 2006 pay ranges for unclassified positions at \$7.12/hr and semi-skilled positions at \$9.24/hr. Beginning in 2005, these hourly values were increased by an estimated 25% benefit cost factor.

Transportation Services

Program Description

Contracts for accessible specialized transportation services for older people and individuals with disabilities.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	1.30	1.81	1.77	1.76	(0.05)
Personnel Costs	\$81,166	\$100,551	\$98,738	\$103,448	\$2,897
Operating Expenses	\$832,497	\$920,019	\$794,660	\$966,830	\$46,811
Interdept. Charges	\$10,348	\$7,318	\$7,939	\$9,336	\$2,018
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$924,011	\$1,027,888	\$901,337	\$1,079,614	\$51,726
General Government	\$472,278	\$485,266	\$486,150	\$538,403	\$53,137
Interdepartmental	\$0	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$472,278	\$485,266	\$486,150	\$538,403	\$53,137
Tax Levy	\$503,179	\$542,622	\$542,622	\$541,211	(\$1,411)
Exp. (Over) Under Rev. & Levy	\$51,446	-	\$127,435	-	-

Program Highlights

RideLine operating costs are projected to increase \$12,458 primarily due to an anticipated 4% vendor increase. Shared fare taxi operating costs are projected to increase \$10,995 due primarily to anticipated vendor cost increases. Shuttle operating costs are projected to increase by \$1,427, including an additional two-hour per month service expansion factor for the Menomonee Falls shuttle. The 2006 budget also includes an increase of \$1,000 for additional out of county medical trips and other demand-responsive medical trips, and \$5,000 for community contracted assistance for non-medical group trips. Miscellaneous grants to communities for non-profit shared-fare taxi/shuttle assistance are expected to increase by \$15,500. Projected increase in postage cost of \$1,613 is the primary reason for additional interdepartmental charges.

A projected 11.0% increase in the State of Wisconsin Department of Transportation (WIDOT) grant results in an additional \$53,137 General Government revenue. The WIDOT grant requires a 20% local match or tax levy funding of \$107,681, which the county significantly overmatches.

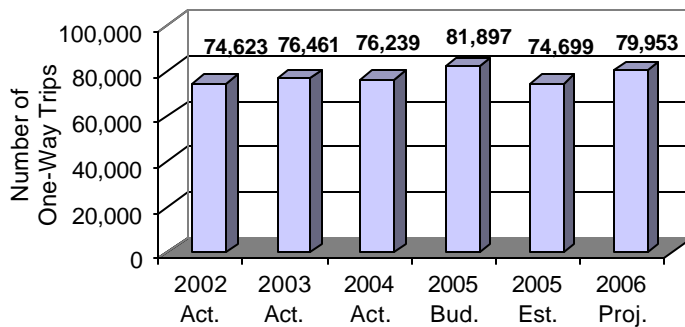
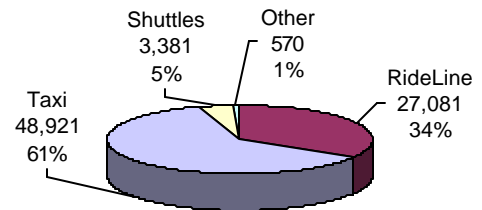
Performance Measure Description

Dept. Std: At least 85% of RideLine one-way trips will be for medical or nutrition purposes.

Performance Measures	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Average cost per one-way trip, shared fare taxi program (one-way trip cost).	\$3.96	\$3.97	\$3.88	\$4.26	\$0.29
Net average cost per one-way trip (after client fees applied), RideLine program (one-way trip cost).	\$22.40	\$23.35	\$23.07	\$24.53	\$1.18
Maintain health by providing transportation for medical and nutrition purposes.	82.7%	85.0%	85.0%	85.0%	0.0%



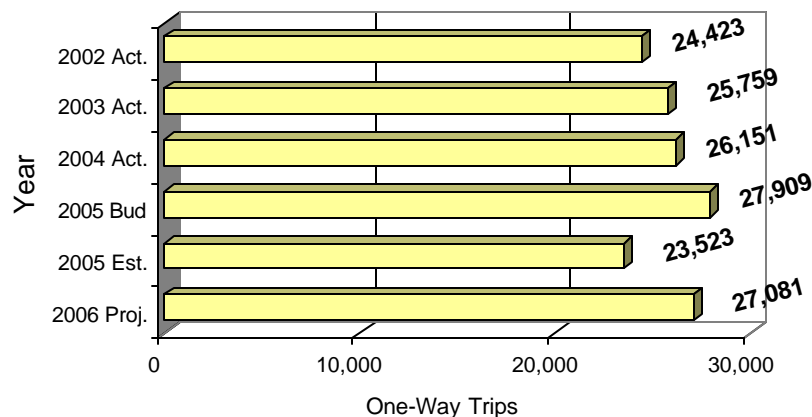
Activity

Specialized Transportation
Total One-Way TripsSpecialized Transportation
Year 2006 Projected One-Way Trips

Total One-Way Trips 79,953

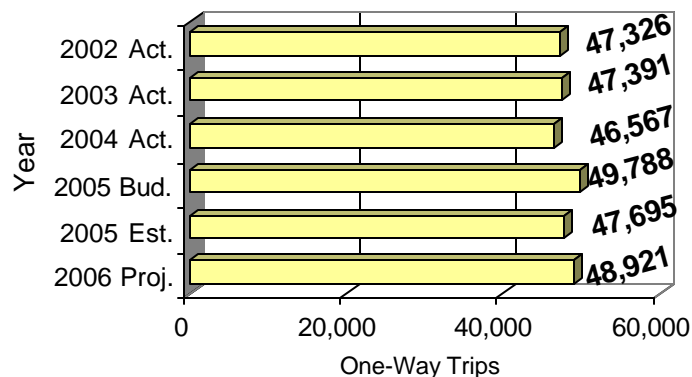
A decrease of 1,944 to 79,953 one-way trips or 2.4% from the 2005 budget is projected for 2006. A decrease of 7,198 one-way trips or 8.8% from the 2005 budget is estimated for 2005 due to fewer than anticipated RideLine medical trips.

RideLine One-Way Trips



The number of one-way RideLine trips in 2006 is expected to decrease by 828 or 3.0% from the 2005 budget based on lower prior year actual results partially offset by anticipated program increases.

Shared-Fare Taxi One-Way Trips



Shared Fare Taxi is expected to decrease 867 one-way trips or 1.7% from the 2005 budget to closer reflect prior year actual utilization.

Adult Day Care

Program Description

Partially subsidizes services provided by contracted adult day centers. Coordinates with Adult Day Center Network to address service delivery needs, including needs related to Alzheimer's Disease, dementia and other chronic disorders.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	0.30	0.35	0.35	0.35	0.00
Personnel Costs	\$23,017	\$25,426	\$24,909	\$26,525	\$1,099
Operating Expenses	\$38,724	\$50,648	\$47,537	\$53,648	\$3,000
Interdept. Charges	\$199	\$183	\$173	\$193	\$10
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$61,940	\$76,257	\$72,619	\$80,366	\$4,109
Charges for Services	\$0	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$0	\$0	\$0	\$0	\$0
Tax Levy	\$77,004	\$76,257	\$76,257	\$80,366	\$4,109

Exp. (Over) Under Rev. & Levy	\$15,064	-	\$3,638	-	-
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Program Highlights

Adult Day Care is subsidized based on a participant's ability to pay. Increase in operating expense is due to experiencing higher subsidy rates resulting from lesser participant ability to pay in 2005, plus a projected 5.9% increase in contract rates resulting from a new Request for Proposal for 2006 services.

Performance Measure Description

This measure indicates the cost per day of each client.



Performance Measures

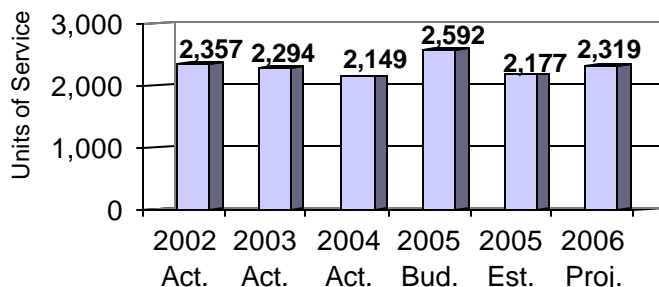
Average net cost per day of care for clients subsidized by the Department of Senior Services.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
	\$28.82	\$29.42	\$33.36	\$34.66	\$5.24



Activity

Adult Day Centers Units of Subsidized Service



With anticipated increases in cost of care, the total days of adult day care are projected to decrease by 273 or 10.5% from the 2005 estimate. On average, 1.3 subsidized days of care per week for 34 clients is projected for 2006.

Administrative Services

Program Description

The Administrative Services program is responsible for coordinating and providing efficient administrative/ clerical support.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	2.65	1.90	1.90	1.90	0.00
Personnel Costs	\$149,775	\$134,054	\$121,138	\$128,419	(\$5,635)
Operating Expenses	\$9,160	\$14,357	\$14,066	\$14,891	\$534
Interdept. Charges	\$13,208	\$11,964	\$11,648	\$11,833	(\$131)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$172,143	\$160,375	\$146,852	\$155,143	(\$5,232)
General Government	\$6,871	\$0	\$0	\$0	\$0
Other Revenue	\$42	\$25	\$45	\$25	\$0
Appr. Fund Balance	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$6,913	\$25	\$45	\$25	\$0
Tax Levy	\$184,252	\$160,350	\$160,350	\$155,118	(\$5,232)
Exp. (Over) Under Rev. & Levy	\$19,022	-	\$13,543	-	-

**Program Highlights**

Due to staffing changes, health and dental insurance costs were reduced \$9,922 and \$759 respectively. These reductions more than offset staff costs to continue and merit increases.

Performance Measure Description

This measure illustrates what the administrative costs are for this department as a percentage of overall expenditures. There are efforts to keep administrative costs below a goal of 6% to allow more dollars to be available for direct programs and services.

**Performance Measures**

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Administration Expenditures as % of total Department Expenditures	5.5%	4.7%	4.6%	4.4%	(0.3%)

Nutrition Fund**Senior Services****Fund Purpose/
Summary****Fund Purpose**

The Department of Senior Services' Elderly Nutrition Programs, Congregate and Home Delivered Meals, function under the provisions of the Title IIIC-1 and C-2 Older Americans Act, as amended. The programs provide low cost nutritious meals meeting one third of the recommended dietary allowance to persons age 60 or older with emphasis placed on outreaching the targeted frail, isolated, homebound and disadvantaged older population.

The Congregate and Home Delivered Meals Programs coordinate a wide range of services for older people including nutrition education, information, referral, and case management and support with the formal and informal support systems of the older population. The nutrition programs contribute significantly to helping older people remain healthy, active and independent in their homes and communities.

Financial Summary	2004	2005	2005	2006	Change From 2005	
	Actual	Adopted Budget	Estimate	Budget	Adopted Budget	
					\$	%
Personnel Costs	\$443,770	\$431,749	\$426,334	\$445,043	\$13,294	3.1%
Operating Expenses	\$662,470	\$680,842	\$646,306	\$668,024	(\$12,818)	-1.9%
Interdept. Charges	\$35,152	\$32,225	\$31,053	\$31,857	(\$368)	-1.1%
Fixed Assets	\$0	\$0	\$0	\$0	\$0	N/A
Total Expenditures	\$1,141,392	\$1,144,816	\$1,103,693	\$1,144,924	\$108	0.0%
General Government	\$592,122	\$613,186	\$610,564	\$610,583	(\$2,603)	-0.4%
Fine/Licenses	\$0	\$0	\$0	\$0	\$0	N/A
Charges for Services	\$0	\$0	\$0	\$0	\$0	N/A
Interdepartmental	\$36,229	\$44,167	\$40,090	\$44,167	\$0	0.0%
Other Revenue	\$309,952	\$305,401	\$301,074	\$303,612	(\$1,789)	-0.6%
Appr. Fund Balance	\$10,150	\$6,475	\$13,699	\$2,375	(\$4,100)	-63.3%
Total Revenues	\$948,453	\$969,229	\$965,427	\$960,737	(\$8,492)	-0.9%
Tax Levy	\$188,006	\$175,587	\$175,587	\$184,187	\$8,600	4.9%
Exp. (Over) Under Rev. & Levy	(\$4,933)	-	\$37,321	-	-	-
Position Summary (FTE)						
Regular Positions	8.60	7.61	7.67	7.61	0.00	
Extra Help	2.38	2.70	2.68	2.72	0.02	
Overtime	0.01	0.01	0.01	0.01	0.00	
Total	10.99	10.32	10.36	10.34	0.02	

Departmental Strategic Objectives**Provide Comprehensive Customer Service**

1. Through provision of nutritious meals and nutrition education, reduce by 20% the average nutrition risk score of home delivered meal participants who had been assessed to be at high risk in 2005. (Strategic Plan Goal 3.2) (4th Qtr)
2. Enhance wellness by increasing physical activity/walking levels and nutritional awareness of Waukesha County senior adults. Based on grant availability, implement "You Can - Steps to Healthy Aging" program at five Senior Dining Centers. (Strategic Plan Goal 1.2) (4th Qtr)

Innovate and Seek Continuous Quality Improvement

1. Senior Services department staff will explore the feasibility and identify the cost effectiveness associated with replacing hot home delivered meals with frozen home delivered meals where appropriate during 2006 for the 2007 proposed budget. Findings will be reviewed with the Health and Human Services (HHS) committee prior to the submission of the department's 2007 proposed budget. (2nd Qtr 2006).

Manage Resources With Fiscal Prudence

1. Collaborate with Mt. Mary College dietetic program interns to provide nutrition intervention and follow-up to recipients with very high nutritional risk scores of 16 and above. (Strategic Plan Goal 3.2) (4th Qtr)

Retain and Develop a High Quality Workforce

1. Maintain a quality workforce through internal communication and opportunities for programmatic and motivational education and training, as well as training that addresses Federal and State guidelines and food safety/handling issues. (Strategic Plan Goal 2.1) (4th Qtr)

Major Departmental Strategic Achievements from 7/01/04 to 6/30/05

1. During the fall of 2004, with the Waukesha County Purchasing Division, completed the Request for Proposal process and awarded a new food service vendor contract, resulting in reduced overall cost of meals served to older adults. (Strategic Plan Goal 1.2)
2. In October of 2004, all Senior Dining Center managers completed the State required "Serving Safe Food" course. (Strategic Plan Goal 2.1)
3. During the fall of 2004, based on a grant obtained in collaboration with the Southeastern WI Area Agency on Aging, and working with Ozaukee and Washington counties, conducted "You Can – Steps to Healthy Aging", a 12 week nutrition/physical activity program, at Menomonee Falls Senior Dining Center. In addition, collaborated further with UW-Extension and Mt. Mary College grant to enhance nutrition programming. (Strategic Plan Goal 1.2 and 1.3)
4. By the end of 2004, reduced the average nutrition risk level of high-risk 2003 home delivered meal recipients by 23.3% from 13.3 points in 2003 to 10.2 points in 2004. Risk will continue to be reassessed annually. (Strategic Plan goal 3.2)
5. By the end of 2004, increased distribution of "Reach" food boxes from 153 clients in 2003 to 161 clients in four subsidized apartment buildings. Food boxes were provided to Waukesha County through Second Harvest of Milwaukee as a result of the State of Wisconsin vitamin settlement award. (Strategic Plan Goal 1.3)
6. Since July of 2004, served 3,980 frozen home delivered meals out of four Senior Dining Centers in response to volunteer driver shortages and increased mileage costs. (Strategic Plan Goal 2.2)
7. During Spring of 2005, with a grant from the Oconomowoc Foundation, began the "You Can – Steps to Healthy Aging" program at the Oconomowoc Senior Dining Center. (Strategic Plan Goal 1.3)
8. During April of 2005, conducted Home Delivered Meal volunteer driver in-service to re-register all volunteers in compliance with Waukesha County's revised volunteer policy. Volunteers were updated on proper food handling and identifying possible client concerns. (Strategic Plan Goal 4.1)

Home-Delivered Meals

Program Description

Provides meals to frail and homebound people age 60 or older who are unable to prepare their own meals. Further nutritional support is provided to high-risk recipients through nutrition education, including home visits and individualized nutritional counseling.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	5.75	5.34	5.36	5.35	0.01
Personnel Costs	\$234,205	\$224,499	\$224,420	\$234,460	\$9,961
Operating Expenses	\$396,064	\$412,348	\$376,612	\$397,587	(\$14,761)
Interdept. Charges	\$16,024	\$14,965	\$14,331	\$14,741	(\$224)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$646,293	\$651,812	\$615,363	\$646,788	(\$5,024)
General Government	\$221,181	\$248,534	\$248,571	\$240,809	(\$7,725)
Interdepartmental	\$35,128	\$42,992	\$38,587	\$42,992	\$0
Other Revenue	\$178,223	\$183,774	\$173,438	\$177,775	(\$5,999)
Appr. Fund Balance	\$1,125	\$925	\$925	\$1,025	\$100
Total Revenues	\$435,657	\$476,225	\$461,521	\$462,601	(\$13,624)
Tax Levy	\$188,006	\$175,587	\$175,587	\$184,187	\$8,600

Exp. (Over) Under Rev. & Levy	(\$22,630)	-	\$21,745	-	-
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Program Highlights

Personnel costs increase due to normal step and merit increases and an increase in health insurance costs related to employee selection of health plans.

The number of meals to be served in 2006 is estimated to decrease by 4,960 or 5.2% from 2005 budgeted meals primarily due to an increased nutrition risk score used to determine cold meal eligibility along with fewer clients. The decrease in the number of meals served along with reduced vendor costs per meal results in a \$23,946 decrease in food costs. This decrease in food costs is partially offset by a projected increase in volunteer mileage reimbursements of \$9,644 in 2006.

General Government revenues from an allocation of Federal Older Americans Act Title IIIC-1 Congregate funding provided to the Home Delivered Meals program is being decreased in the amount of \$7,781 from \$37,398 to \$29,617 in the 2006 budget. Federal Older Americans Act Title IIIC-2 Home Delivered Meals funding allocation is projected to increase \$6,524 from \$159,521 to \$166,045 in 2006, however this increase is offset by a projected decrease in allocated contract meal reimbursement amounts from the Nutrition Services Incentive Program (NSIP) of \$6,487 from \$46,648 to \$40,161 in 2006. Fewer meals served results in a decrease in general client donations of \$5,853 which accounts for the majority of the decrease in other revenues. Interdepartmental revenues are received from the county's Health and Human Services department for meals served to Community Integration and Community Options Program (CIP/COP) clients. Appropriated fund balance of \$1,025 will be used for one-time purchases.

Performance Measure Description

Performance measures illustrate program effectiveness. The ability of program participants to live more independently as well as the costs associated with providing the meals are measured.

Performance Measures	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Reduced nutrition risk scores for high - risk HDM participants. Dept. Std: 20% reduction from average score of previous year's high-risk participants.	23.3%	20.0% reduction	20.0%	20.0%	0.0%
Increased ability to live independently. Dept. Std: 75% positive response to Customer Survey.	77.8%	75.0%	77.6%	75.0%	0.0%
Gross Cost Per Meal	\$6.96	\$6.81	\$6.91	\$7.12	\$0.31
Avg. client donation per meal	<u>\$1.83</u>	<u>\$1.87</u>	<u>\$1.87</u>	<u>\$1.87</u>	<u>\$0.00</u>
Net cost per meal	\$5.13	\$4.94	\$5.04	\$5.25	\$0.31

Home-Delivered Meals (cont.)



Activity

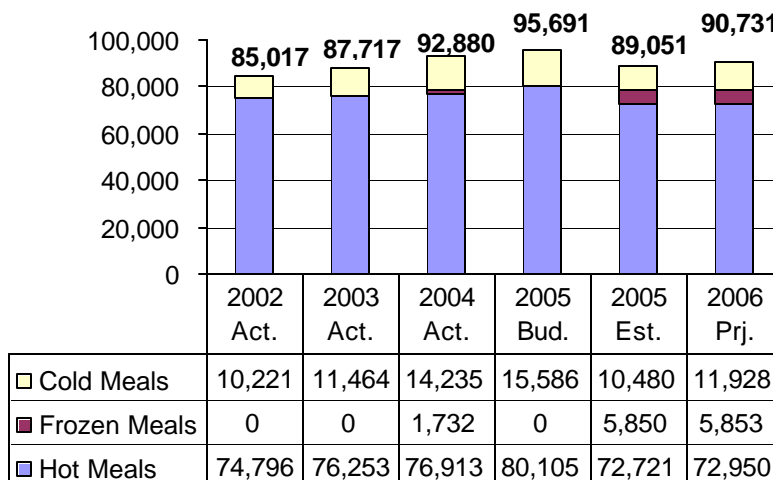
The Administration on Aging established core nutrition risk definitions that are incorporated into the Nutrition Check Plus screening tool to determine nutrition problems that could interfere with future health and independence. A Department strategic objective addresses the need to reduce high risk scores. Risk is assessed annually or more frequently if warranted.

NUTRITION CHECK PLUS

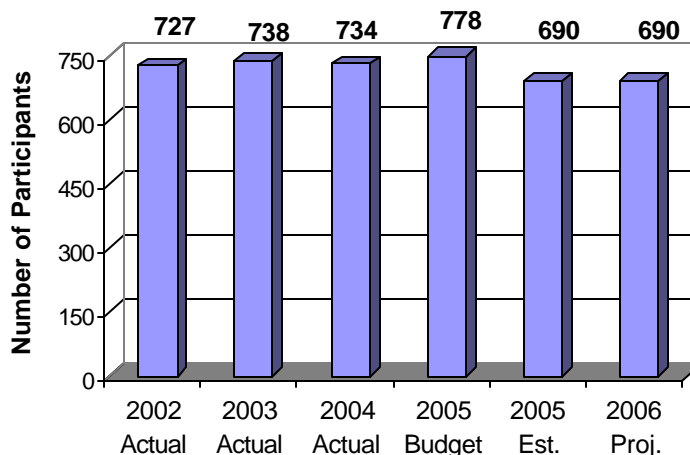
<u>Risk</u>	<u>Score</u>
Low	0 – 4
Moderate	5 – 9
High	10 – 15
Very High	16 or more

Total Home Delivered Meals Served

The total 2006 home delivered meals are expected to decrease by 4,960 or 5.2% from 2005 budgeted meals. Projected number of meals for 2006 anticipates a 1.9% increase from the 2005 estimated number of meals to be served.

**Number of Registered Home Delivered Meal Program Participants**

Based on actual experience in 2005, the number of registered participants is expected to decrease by 88 or 11.3% from the 2005 budgeted level.



Congregate Nutrition

Program Description

Provides a noon meal with socialization, education and information sessions at neighborhood senior dining centers for individuals eligible under the Older Americans Act and the Wisconsin Elderly Nutrition Program.

	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Staffing (FTE)	5.24	4.98	5.00	4.99	0.01
Personnel Costs	\$209,565	\$207,250	\$201,914	\$210,583	\$3,333
Operating Expenses	\$266,406	\$268,494	\$269,694	\$270,437	\$1,943
Interdept. Charges	\$19,128	\$17,260	\$16,722	\$17,116	(\$144)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$495,099	\$493,004	\$488,330	\$498,136	\$5,132
General Government	\$370,941	\$364,652	\$361,993	\$369,774	\$5,122
Interdepartmental	\$1,101	\$1,175	\$1,503	\$1,175	\$0
Other Revenue	\$131,729	\$121,627	\$127,636	\$125,837	\$4,210
Appr. Fund Balance	\$9,025	\$5,550	\$12,774	\$1,350	(\$4,200)
Total Revenues	\$512,796	\$493,004	\$503,906	\$498,136	\$5,132
Tax Levy	\$0	\$0	\$0	\$0	\$0

Exp. (Over) Under Rev. & Levy	\$17,697	-	\$15,576	-	-
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Program Highlights

Personnel costs increase due to normal step and merit increases and an increase in health insurance costs related to employee selection of health plans.

The number of meals to be served in 2006 is expected to increase by 2,171 or 3.5% from 2005 budgeted meals resulting in an increase of \$4,126 in food costs to \$242,519. The increase in operating expenses is expected to be partially offset by decreases of \$4,430 in small equipment and \$1,128 in outside printing in 2006.

Federal Older Americans Act Title IIIC-1 grant allocation to be used in the Congregate program is expected to increase by \$8,151 or 2.5% from \$324,669 to \$332,820 in 2006. This increase in General Government revenue is partially offset by an expected decrease in allocated contract meal reimbursement amounts from the Nutrition Services Incentive Program (NSIP) of \$3,029 from \$35,708 to \$32,679 in 2006. With the projected increase in number of meals served, client donations are expected to increase by \$4,210 from \$121,627 to \$125,837 in 2006.

Performance Measure Description

These performance measures illustrate Congregate Nutrition Program effectiveness.

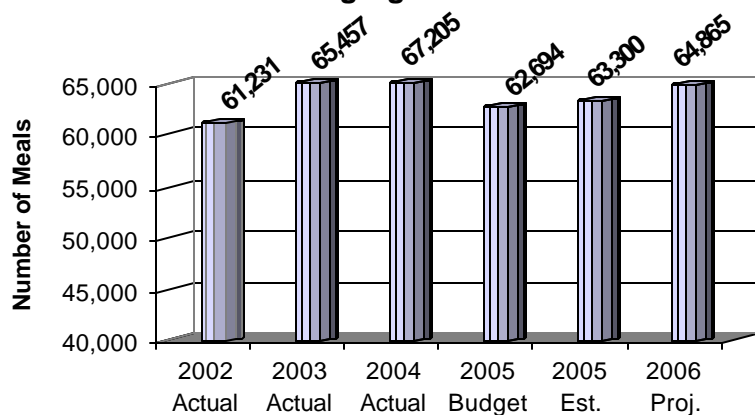
Performance Measures	2004 Actual	2005 Budget	2005 Estimate	2006 Budget	Budget Change
Gross Cost per meal	\$7.37	\$7.86	\$7.71	\$7.68	(\$0.18)
Average donation per meal	<u>\$1.94</u>	<u>\$1.94</u>	<u>\$1.94</u>	<u>\$1.94</u>	<u>\$0.00</u>
Net cost per meal	\$5.43	\$5.92	\$5.77	\$5.74	(\$0.18)
Reduce isolation through socialization opportunities at lunch centers, as measured by 83% positive response (Dept. Std) to customer survey.	86.6%	83.0%	83.2%	83.0%	0.0%





Activity

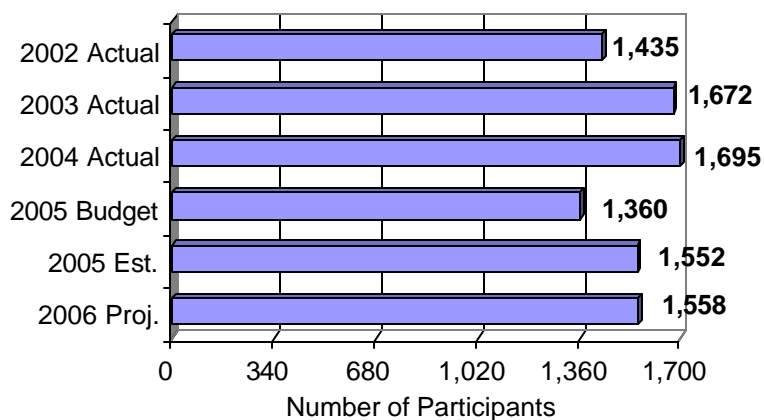
Number of Congregate Meals Served



The projected number of meals served in the 2006 congregate program is expected to increase by 3.5% or 2,171 meals from the 2005 budgeted level. Increase in number of meals takes into account two additional service days in 2006 versus 2005.

Congregate Meal Program
Registered Participants

Based on actual experience during 2005, the number of congregate meal program participants is expected to increase by 198 or 14.6% in 2006.

Number of Nutrition/Health Educational Sessions
at Senior Dining Centers

2002 <u>Actual</u>	2003 <u>Actual</u>	2004 <u>Actual</u>	2005 <u>Estimate</u>	2006 <u>Projection</u>
474	556	833	659	679

Data for 2002, 2003 and 2004 is based on 13 Senior Dining Centers, and for 2005 and 2006 on 12 Senior Dining Centers.

During 2004 several dietetic interns were available to conduct educational sessions at the Senior Dining Centers. Reduction in the number of sessions for 2005 and 2006 is based on fewer Senior Dining Centers being in operation than in previous years and on changes in intern programming.